

NPT's Donor-Advised Fund

At National Philanthropic Trust, we understand that your charitable mission is as unique as you are. NPT was founded as an independent public charity with the sole purpose of helping donors like you reach your philanthropic goals. We're proud to be your partner in giving.

Our flexible, collaborative approach to donor-advised funds (DAFs) helps you make gifts that are tax-efficient and impactful for the causes most important to you.

What is a donor-advised fund?

A DAF is a charitable giving vehicle administered by a sponsor organization. A donor establishes a DAF account with an irrevocable contribution to NPT. You advise the DAF account by recommending investments and grants, and NPT manages administrative functions like legal oversight and recordkeeping.

A DAF requires no start-up costs and is charged an investment fee and a charitable administrative fee based on the account balance.

Versatile, cost-effective and time-efficient, DAFs are the nation's fastest-growing charitable vehicle.

Benefits of a donor-advised fund

- **Recommend Grants Your Way:** Grant locally or internationally, with recognition or with total anonymity. Create specialized grant agreements or recurring grants to any qualified charity.
- **Manage Your Gift Timing:** Make a charitable gift whenever it makes sense for your financial planning, and support your favorite charities whenever they are most in need.
- **Contribute a Variety of Assets:** Contribute assets including stock, real estate and tangible personal property to create philanthropic capital.
- **Receive Tax Advantages:** Receive a fair market value tax deduction and avoid capital gains tax on contributions of complex assets held longer than one year. Carry forward the excess deduction for five tax years.

HOW A DONOR-ADVISED FUND WORKS



What NPT offers

Quick, Easy Setup

NPT can establish your new DAF in less than a day and does not charge set-up fees.

Charitable Legacy

NPT allows you to establish a legacy of giving beyond your lifetime by naming charitable beneficiaries and/or successors who can recommend grants.

Advisor-Managed Accounts

If you give \$500,000 or more, your financial advisor may recommend a custom investment portfolio, subject to NPT's investment policy.

Advanced Philanthropic Services

NPT's philanthropic experts can help you develop a personal giving strategy or identify charities that align with your mission. For DAFs of \$5 million or more, NPT offers specialized concierge support.

Use an NPT DAF when you are:

- **Giving strategically.** A DAF can help you increase your charitable impact and streamline your philanthropy, making it even easier to make a difference.
- **Facing a wealth event like the sale of a business or a merger.** You can incorporate a charitable contribution into these wealth events to alleviate your tax burden.
- **Preparing for estate or retirement planning.** You can prefund charitable giving now to support your favorite causes later—even after your lifetime.

What to expect when you work with NPT

Since our founding in 1996, we have become nationally recognized leaders in philanthropy. Drawing from decades of experience, NPT will help you convert your assets into charitable capital and support the causes closest to your heart. When you work with us, you can expect:

INNOVATION

Our team identifies trends affecting the charitable landscape, helping us develop new strategies for your giving goals.

COLLABORATION

Our donor-centric model keeps you empowered to do the most with your philanthropy. We work with you to find the best strategy for your contribution.

VERSATILITY

We accept a wide range of assets and offer a variety of investment options, allowing you to customize your philanthropy.

DAF contribution tax benefits:

DEDUCT UP TO

30%

ADJUSTED GROSS INCOME
FOR GIFTS OF STOCK

DEDUCT UP TO

60%

ADJUSTED GROSS INCOME
FOR GIFTS OF CASH

AVOID UP TO

23.8%

CAPITAL GAINS TAX
FOR GIFTS OF
APPRECIATED ASSETS

NPT is a public charity, and contributions to an NPT DAF offer the greatest allowable tax benefits.

NPT does not provide legal or tax advice. We strongly encourage you to consult with your tax advisor or attorney before making charitable contributions.

Get Started

Any individual, family, trust, business or nonprofit organization can open a DAF with an initial contribution of \$10,000 or more, and can make additional contributions at any time.

Learn more at our website, nptrust.org, or by reaching out to us at npt@nptrust.org or (888) 878-7900.